



## STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Property Assessment Division Regional Manager

**Job Code Title**

Program Manager IV and V

**Pay Band**

7d and 7e

**Job Code Number**

111917

**Property Assessment Division**

Regional Offices

**Fair Labor Standards Act**

Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Property Assessment Division is responsible for administering Montana's property tax laws, including the valuation and assessment of real and personal property throughout the state for property tax purposes. The division is responsible for ensuring that all classes of property in the state are valued uniformly and equally throughout the state. The work of the division is critical to the operation of local governments, since the resulting valuation is used annually to fund important services provided by local government, including public schools, law enforcement, fire protection, road and bridge construction and maintenance, transportation, weed control, and public assistance. The functions of the division are performed by staff statewide in four regions with offices in each of the 56 counties and Central Office located in Helena.

**Job Responsibilities**

The Property Assessment Division Regional Manager allocates financial and staff resources; plans and directs the programs and services of the region; administers region policies, administrative systems, operations, and budget; coordinates special projects; represents the department in appeals; and assists attorneys in legal proceedings. The incumbent has leadership responsibility for the development of quality assurance/control standards and associated measurement methods and auditing program for the region and division. Provides a common view across the region and division to ensure consistent quality and process improvement. The technical aspects of the work units are left to the unit managers, specialists, and business experts. The position reports to the division administrator; directly supervises unit managers; and indirectly supervises all other region staff. The managers in Regions 1-3 are pay band 7d and the manager of Region 4 is pay band 7e.

- **Region Administration, Planning, and Management 45%**

Assists the division administrator in the development of short and long-range goals and objectives of the region. Plans, directs, and coordinates region programs including quality assurance/control; strategic planning; region and division representation; policy development; legislative analysis and testimony; and other planning activities to ensure the ongoing effectiveness, compliance, and achievement of overall division goals.

1. Develops regional quality assurance programs. Works with the other regional managers in developing uniform division-wide programs. Ensures the quality of work and conformance to industry and department standards.

2. Reviews current policies, procedures, and processes. Creates new ones and recommends improvements as necessary. Continually monitors policies, procedures, and processes for improvement opportunities and for quality assurance/control.
3. Determines the overall direction of the region. Establishes goals and objectives and develops a comprehensive short- and long-term work plan compatible with the broader departmental and legislative missions and goals. Provides substantive input on the department's overall strategic plan.
4. Determines organizational structure of the region. Sets program policy and coordinates with department operations and programs to meet the overall mission of the agency.
5. Analyzes the impact of changes to state and federal regulations and policies affecting region programs. Develops and implements standards, policies, and procedures to ensure ongoing effectiveness and compliance with laws and regulations.
6. Evaluates the effectiveness of region programs. Periodically reviews emerging issues and trends to assess how they affect current goals, operating environment, and assumptions.
7. Builds long-term internal and external relationships with other department divisions, local governments, taxpayers, and community groups. Negotiates and resolves issues with internal and external customers and determines the appropriate method to resolve disputes. Participates in statewide departmental activities. Builds a network of peer relationships within and outside the department.
8. Reviews and analyzes region activities and data to aid planning, resource management, and public policy development. Considers the effects of decisions or recommendations on public and legislative relations. Provides advice or consultation to the division/department management team, external agencies, and others.
9. Develops updates and recommendations for the division administrator on potential problem areas and changes within the region including issues such as the effectiveness of programs; actual or potential revenue issues and concerns; proposed agency actions and responses; and public relations.
10. Reviews and recommends new legislation and administrative rules. Gathers input from the public, other governmental agencies, and region staff. Reviews current Montana statutes and those of other states. Develops proposals for legislation or administrative rules. Presents proposals to the division administrator and may present them before the legislature. Writes legislative bills and fiscal notes. Testifies at the legislature on behalf of the department.
11. Monitors the use of services, funding, and staff to ensure effective use of region resources. Assesses the need for additional staff, equipment, and services. Assesses the impact of changes in technology, state and federal requirements, and department operations. Determines methods to increase efficiency.
12. Compiles, reviews, and formulates the budget for the region to allocate resources and comply with legislative intent and statute. Prepares the region budget. Researches and analyzes the cost of services. Prepares cost and revenue estimates. Submits justifications for needed materials and equipment. Preparing various budget reports.
13. Projects future expenditures and year-end balances; identifies areas of concern and discrepancy; and makes status reports to the division administrator to determine program budgetary actions.
14. Directs the procurement, purchase, and inventory control of region equipment and supplies. Ensures adequate and contemporary equipment and technology are available within budget constraints. Ensures compliance with state accounting and property management requirements.
15. Effectively represents the region, division, and department at meetings, conferences, hearings, committees, and other proceedings and events.
16. Serves as a member of applicable management teams. Appropriately participates in team decision-making and associated activities.
17. Keeps abreast of legislative, regulatory, management directive, organizational, or other changes or initiatives that may affect assigned area, analyzes impact, and recommends or takes necessary action to address them.

18. Develops various reports, spreadsheets and other tracking methods to monitor region status, work progress, and performance. Identifies information needs. Determines and implements effective tracking and reporting systems. Monitors collected data to identify areas of concern. Provides analysis to management and others to resolve problems, make legislative presentations, and identify areas of strength and weakness.

- **Staff Leadership, Management, and Supervision 30%**

Incumbent is responsible for leading staff; delegating the management of division programs to subordinate managers appropriately; and managing the day-to-day activities of the region. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

#### Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.
2. Provides leadership and mentoring opportunities to direct and coordinate the activities of staff through subordinate managers to ensure efficient operations and increase productivity including implementing and monitoring corrective action plans to solve problems.
3. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
4. Maintains an atmosphere of safety within the region. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
5. Makes and accepts responsibility for decisions necessary to carry out the region's mission.
6. Accepts direction and feedback from supervisors and follows through appropriately.
7. Provides appropriate direction and feedback to subordinate supervisors. Ensures that delegated responsibilities are carried out and delegated authority is used appropriately.

#### Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; region needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.

7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, region performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the region follows department expectations regarding disclosure and employee confidentiality.

#### Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties.
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures, and collective bargaining agreements.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

#### • **Other Administrative and Legal Functions 20%**

1. Provides assistance and advice to department attorneys during appeal proceedings. Provides information and documentation. Assists in examination and analysis of documents. Recommends appropriate resolutions. Testifies in hearings as required.
2. Works with Legal Services in representing the department in administrative and district court hearings by providing background information and documentation; assisting in examination and analysis of documents; and recommending enforcement strategies.
3. Works directly with internal customers to ensure processing objectives meet expectations of other business units in conjunction with department goals and objectives.
4. Works directly with external customers to ensure exemplary service that meets department goals and objectives as well as the customer's expectation.

5. Communicates by phone; in writing utilizing department written communication guidelines; and in face-to-face meetings. Presents themselves in a professional and respectful manner.

- **Other Duties 5%**

1. Performs a variety of other duties as assigned.
2. Acts for the division administrator as assigned.
3. Directs special projects.

### **Job Requirements**

To perform successfully as a regional manager, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team; make sound decisions and be accountable for them; generate innovative ideas; and have personal initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

The incumbent must demonstrate professional knowledge of federal, state, and department property tax principles and practices for all property tax types. Knowledge of applicable state and federal regulations, statutes, and policies; public administration and management including strategic planning; project management; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; resource allocation; leadership techniques; governmental organizational structure, accounting, and budgeting; legislative and administrative rule processes and guidelines; and state and department policies, procedures, and precedents is required. The work also requires knowledge of computers and database management including state and department information systems (ORION); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in accounting, business administration, public administration, economics, or related field and seven years of job-related work experience including three years of direct supervisory, budgetary, and program management experience.
  - Work experience should include professional level experience in all property tax areas.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for

their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.

- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the region. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. Leading up to and during legislative sessions work hours routinely exceed 40 hours per week and may include working evenings and weekends. Extensive travel is required, sometimes on poor road conditions and in adverse weather conditions. A valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Cynthia Monteau Moore, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (print): \_\_\_\_\_